INTRODUCTION AND GENERAL STATEMENTS

1.01 OSU Institute of Technology (OSUIT) purchasing and procurement practices are bound by policies established by the Board of Regents for the Oklahoma Agricultural & Mechanical Colleges and procedures set by the Oklahoma State University (OSU) Purchasing Department for OSU and the A&M Campuses and State Law. This policy is intended to list the general policies, procedures and practices which have been established to facilitate the procurement processes for OSUIT.

1.02 The purchasing policy for OSUIT is designed to provide uniform procedures that are consistent and compliant with OSU purchasing policy.

1.03 It is accepted that no policy and procedure statement can cover all eventualities. Exceptional cases will be resolved as circumstances and prudent business practices warrant.

1.04 The OSUIT Purchasing department is administered by a Director whose line of administrative responsibility is through the Vice President of Fiscal Services and delegated by the campus President. This Purchasing department shall coordinate all purchases for OSUIT locations and questions, inquiries or correspondence related to university purchases should be routed through this department.

1.05 It is the mission of OSUIT Purchasing to assist in procuring needed materials, equipment, and contractual services on a timely and economical basis within accepted standards of quality and service so that the basic functions of OSUIT are fulfilled. This office is also the campus liaison between University Purchasing, University Accounting, and Fiscal Compliance offices in Stillwater, and to campus suppliers with regard to procurement matters. While each campus department is responsible for complying with policies and procedures, the OSUIT Purchasing department will assist in assuring that compliance is maintained.

1.06 It is the responsibility of each employee involved in the procurement process to become familiar with the procedures and apply them correctly. OSUIT Purchasing is the primary source for information and training regarding purchasing and procurement services for the campus.

1.07 Purchasing activities are routinely reviewed for compliance by OSUIT’s purchasing staff and the OSU Fiscal & Administrative Compliance Office. Purchasing activities are further audited routinely for compliance with university and Board of Regents’ policies by the OSU and A&M Board of Regents’ Internal Audit Office. The Purchasing
department shares responsibilities with other OSUIT administrators in carrying out purchasing and procurement functions in such a manner that all transactions will pass compliance review and audit.

POLICY

2.01 The purchases by OSUIT are conducted in accordance with four levels of governance:

A. Board of Regents Policies and Rules,
B. State of Oklahoma Statutes,
C. OSU Policies and Procedures (3-0145 and 3-0147),
D. Campus policies and procedures, and
E. OSUIT departmental policies and procedures, where applicable.

2.02 Scope: This policy and subsequent procedures apply to the purchase of all goods, equipment and contractual services.

2.03 Consistent with Board of Regents’ Policy, competitive bidding is required on most acquisitions or contracts in excess of $5,000 as prescribed by the following:

A. Any acquisition or contract for an amount of $5,000 or less shall be exempted from competitive bidding procedures. Separate contracts or acquisitions for the individual components of a total project or service or split purchasing for the purpose of evading the requirement of competitive bidding shall be examined by Purchasing to determine if a policy violation occurred.

B. Contracts for architectural, engineering, legal or other professional services as such term is defined in Section 802 of Title 18 of the Oklahoma Statutes, shall be exempt from competitive bidding procedures.

C. Acquisitions or contracts shall be awarded based on lowest and best value to the University. Bid openings are open to the public.

2.04 University departments are encouraged to use approved OSU purchasing contracts whenever departmental needs can be served adequately and economically for supplies and equipment. Prices include to an Oklahoma address and Net 30 terms. The contract number and itemized prices as shown on the current contract for each item must be listed on all quotes.

AUTHORITY TO APPROVE PURCHASES

3.01 Purchasing for all agencies under the jurisdiction of the Board of Regents for Oklahoma A&M Colleges shall be unified and integrated; a Director of Purchasing shall coordinate these purchases. (OSU Policy and Procedures 3-0145) The Director of Purchasing for Oklahoma State University and the A&M Colleges, who offices in Stillwater, OK is the only person authorized to make purchase awards, commitments, or contracts for the university, unless specific delegation of authority is made.
3.02 Authority delegated to OSUIT

A. By delegation from the OSU System CEO/President, the OSUIT campus President is authorized to make direct purchases of supplies, materials, equipment and services when the dollar value is $10,000 or less. All other purchases must be initiated by requisition and are made only by issuance of a purchase order by the Director of Purchasing at OSU-Stillwater. Without this document properly approved by the Director of Purchasing, the university is not obligated to commitments for purchases.

B. The OSUIT President further delegates the authority for these direct purchases $10,000 or less, within certain limitations, to OSUIT Vice Presidents, Department Heads and Unit Leaders under the guidance and direction of the campus’ Purchasing Office with and through Fiscal Services.

C. OSUIT, through its purchasing department, has delegated authority by the OSU and the A&M Institutions’ Purchasing department to procure products and services for OSUIT locations up to $10,000 in strict compliance with all related policies and procedures.

D. Within certain limitations, authority to make direct purchases and/or to initiate requisitions is granted by the OSUIT President to appropriate unit leaders for their cost centers only on the basis of function and types of funds expended. These stated limits apply with all other authority to make purchases or initiate requisitions.

3.03 All contracts, regardless of amount, require the Director of Purchasing for OSU and the A&M Colleges’ signature. Contracts between $0.00 and $10,000 should be submitted prior to requisition submission. Any contract and/or equipment list greater than $10,000 should be attached to the requisition and submitted for approval through the university’s requisitioning process.

3.04 OSUIT personnel who have received training and been issued a university purchase card, hereinafter referred to as “P-Card”, are authorized to make approved, single purchases up to the lesser of their single transaction limit or $5,000. These purchases shall be in strict compliance with university policies, procedures and guidelines as they relate to Purchasing and the P-Card.

PURCHASING METHODS: Dollar Limits and Requirements

4.01 Purchase Card (P-Card)

The P-Card is a State of Oklahoma purchase card program that establishes the use, by designated State employees, of commercial purchase cards to facilitate the acquisition of goods and services necessary for conducting official State business. This program, a state contract awarded to a national, issuing bank is authorized by the Oklahoma Central Purchasing Act (74 O.S. § 85.5(C.)(15.) & (L.).

OSU’s purchase card program, under the state contract, is based in the Fiscal and Administrative Compliance Office at OSU-Stillwater. It is the intent of OSU to facilitate the acquisition of lower dollar goods and services needed for conducting official
university business. The P-Card is to be issued to selected university employees. The cardholder is responsible for and accountable to the university for all charges made with their P-Card. Use of the P-Card is solely for official university purchases. Personal purchases are strictly prohibited and may result in disciplinary action. The P-Card program may be extended to OSU student organizations provided all compliance requirements can be met. This program is the method designed by the university to make most of OSU’s small dollar purchases.

In conjunction with this program, the issuing bank furnishes OSU access through internet-based software to online transaction information used to track and review all P-Card purchases for continuous reconciliation and funding verification prior to data transmission for accounts payable processing.

Guidelines for the OSU Purchasing Card Program have been established and are available online on the OSUIT shared drive (I). These guidelines are intended to be a tool to ensure OSU complies with State statutes regarding purchases. OSUIT Purchasing and Fiscal Services may, at its discretion, establish additional requirements within these guidelines to ensure campus compliance with regard to purchases and procurement of goods and services for official university business.

Training is required for all cardholders and others requiring access for various roles within the online transaction system. The cards issued, although bearing a VISA or MasterCard logo and are accepted as such, are not credit cards but purchase cards. These cards are the property of OSU and must be returned upon leaving employment and/or at the request of administration. The cardholder is the only person authorized to make purchases using his/her card.

Having a P-Card does not imply prior approval. All transactions/purchases must be pre-approved, with the approver verifying budget dollars are available. Each transaction will be signed off by the cardholder and then signed off by the approver(s) in the system.

A. While $5,000 is the university’s threshold for small dollar purchases; $2,500 is the maximum, per transaction, card limit for OSUIT cardholders at the departmental level unless otherwise approved by the Vice President of Fiscal Services.

B. All OSUIT Purchasing staff maintain the $5,000 card limit to help meet the needs of the campus for small dollar purchases that exceed the departmental level cardholder per transaction limit and to reduce the university’s liability exposure.

4.02 Requisitions

The university maintains an electronic procurement system to streamline and improve requisition and reimbursement processes as a method of acquiring goods and services to facilitate department and university goals. This electronic system is used to process all requisitions and issue purchase orders through the Purchasing department.
A. Any purchase that cannot be made on a P-Card within the above stated limit should be submitted online along with any support documents to the OSUIT Purchasing department through the requisitioning process.

B. All purchases over $5,000 must be processed on a requisition.

C. $5,000.01 to $35,000: Oklahoma Statutes and university purchasing policy require the solicitation of formal competitive quotations for these acquisitions and contracts. Departments must provide Purchasing with specifications listing all critical elements (minimum requirements).

D. $35,000.01 to $250,000: In accordance with Oklahoma State Statutes, both Board of Regents and OSU policy require formal sealed competitive bids. Departments must provide Purchasing with specifications listing all critical elements. These purchases require (electronic) approval of:
   - Campus President
   - OSU A&M System Vice President
   - OSU A&M System President (if $100,001 or more)

4.03 Board Approval

Regardless of funds used, advance approval by the Board of Regents is required for purchases that exceed $250,000.

A. Oklahoma statutes and university purchasing policy require the solicitation of formal sealed competitive bids for acquisitions and contract which exceed $150,000. Departments must provide Purchasing with specifications listing all critical elements. These purchases require (electronic) approval of:
   - Campus President
   - OSU A&M System Vice President
   - OSU A&M System President
   - Board Approval

B. Purchases that are exempt from Board approval are: items for resale, bulk gasoline, oil, fuel, utilities, non-construction sponsored agreement contracts and expenditures, and refunds.

4.04 Specific procedures apply and the Purchasing Office should be contacted for the following items:
   - Carpeting
   - Computers, iPads, Tablets, etc.
   - Credit Cards/P-Card
   - Emergency Orders
   - High Profile Items (cameras, handheld electronic devices, projectors, printers)
   - Insurance
   - Lease of Land or Building Space
   - Maintenance Agreements
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- Memberships
- OSU Contract Orders
- Printing & Duplicating Services
- Professional Services
- Public Improvement Projects
- Purchase from University/State Employees
- Repairs to Buildings
- Repair of Equipment
- Retreats
- Software License Agreements
- Sole Source Purchases
- State Contract Purchases
- State Surplus Property
- Trade-Out Agreements
- Travel
- Used Equipment
- Vehicles, Vehicle Supplies/Repairs
- Other

4.05 Campus Vendor Invoices

All transactions for goods and/or services between OSU departments are processed through the Campus Vendor System. This Campus Vendor Invoice (CVI) is prepared by the department and submitted to the OSUIT Accounting Office for processing.

PROCEDURES

5.01 P-CARD

A. Participation/Training: Specific purchase card training is required before a P-Card can be issued to any employee and for any individual who will hold a user role (i.e., manager, approver) in the electronic transaction sign-off approval process.

1. An Application form for P-Card and/or the User Access role(s) must be completed to request a P-Card and/or to be assigned one of the user roles (i.e., cardholder, manager, approver, etc.). Cardholder dollar limits are established with the completion of this form.

2. A Conflict of Interest form must also be completed by P-Card holders. This form is renewed each year at the request of OSU’s Fiscal and Administrative Compliance Office.

B. The cardholder must sign a Purchase Card Employee Agreement form upon receipt of the P-Card.
C. A departmental P-Card should be used by departments for all qualified purchases of $2,500 or less. This amount must be all inclusive of installation, freight, shipping and handling or any other related cost/charges. For good business practices, employees are encouraged to check availability and pricing with more than one supplier prior to qualified purchase.

In cases of qualified purchases as listed directly below whereby the P-Card cannot be used, the invoice and/or support document(s) is to be sent to OSUIT Purchasing through the requisition process for payment.

1. The vendor does not accept MasterCard.
2. The vendor demands an up-charge/fee for the use of the card. (Contact Purchasing)
3. The purchase is not in compliance with P-Card policies, procedures and guidelines.

D. In conjunction with purchases less than $2,500, the OSU Purchase Card (P-Card) program establishes the rules for use by designated university employees. These rules, outlined in the OSU Purchasing Card Guidelines, cover the use of commercial purchase cards to facilitate the acquisition of lower dollar goods and services needed to conduct official university business. All cardholders and employees are encouraged to familiarize themselves with the Guidelines.

An anticipated purchase must not be prohibited or in conflict with university policies. If it is determined that the anticipated purchase requires additional processing, or must be done by requisition, it is excluded from the small order system.

E. Pre-approval of each purchase is required. Each department with an active P-Card must have a written pre-approval policy in place that outlines auditable procedures for the pre-approval process. The cardholder should follow the steps outlined in his/her department’s policy to obtain the required approval before a purchase is made. Although the process for pre-approval may vary by department, the auditable approval (written, email, etc.) should be maintained along with all other appropriate documentation that supports the purchase to exhibit compliance.

The university recognizes that verbal communication/approval may be necessary (given) periodically, and in these few cases, should be followed up and/or confirmed in writing/email.

F. All P-Card orders with the exception of Point of Sale transactions and online orders (if option not available) are encouraged to have a department issued purchase order number issued/assigned by the cardholder (prior to purchase). Where necessary a desktop PO should/could also be sent to the supplier. This form is available online on the OSUIT Shared Drive (I) and by contacting the OSUIT Purchasing office.

G. Ordering: Determine if the anticipated purchase is prohibited or conflicts with university policies. If it is determined that the anticipated purchase requires
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additional processing, or must be done by requisition, it is excluded from the small order system.

Select a vendor who can supply the needed items at a reasonable cost and obtain the following information:

1. A firm price quotation must include delivery charges (if delivery is required) as well as the date, federal employer's identification number, and name of the person making the quote. When appropriate, additional quotes from other suppliers may be requested for the purpose of making the best buy (see Shared Drive: I).

2. Will the supplier accept a telephone order or is a written confirming order PO (desktop purchase order) required? Telephone or counter orders should be made whenever possible and feasible. Written orders may be made on the telephone Quotation form (See Shared Drive: I).

3. If the vendor does not accept the purchase card, the department should issue the supplier the next sequential order number from the departmental OKM Small Order Control Log (OKM Purchase Order #) and enter the required information on the log. If a written order was required, the order number must be included on the order.

4. The supplier should be given specific delivery instructions (if required) and should be requested to email/mail an original invoice directly to the ordering department. If merchandise is picked up by the department, the invoice may be obtained at that time. The invoice must include the department's order number and the vendor's complete name, address, etc.

H. Procedures for the receipt of merchandise: The ordering department is responsible for the inspection of all items to assure goods received are as specified and for contacting the supplier for correction, if necessary. In the event of an impasse between the ordering department and the supplier, assistance may be obtained from OSUIT Purchasing. Do not pay invoices on merchandise intended for prompt return. Instead, contact the vendor for the credit memo to match with this invoice to allow payment of only the items kept. However, follow up on these invoices to keep suppliers paid.

1. Audit each invoice for products received, pricing, extensions and the correct invoice total. Any discrepancies should be clarified and/or corrected with the supplier immediately.

2. Check for a cash discount. If offered, deduct cash discount when paying the invoice. Verify appropriateness of sales tax if charged. As a state agency, the university does not pay sales tax on purchases within the State of Oklahoma.

If sales tax has been charged on a purchase within Oklahoma, the cardholder is responsible for contacting the vendor for removal of this tax, and/or may be responsible for reimbursing the university for these taxes.
3. OSUIT has established the “OKM” purchase order number system that is inherent to its locations for small dollar purchases. These OKM purchase order numbers have been assigned to each campus department and service unit by OSUIT’s Purchasing Office to be used for this purpose (purchases up to $2,500) for delivery, tracking and invoicing, etc. Each individual cardholder may be assigned a block of these numbers by the unit’s administrative assistant. The purchase order (if/where issued) should also be included as a support document for cardholder purchase.

4. When and where the estimated cost of product or service exceeds the departmental/unit P-Card limit(s) and is less than $5,000, contact the OSUIT Purchasing Office who will then procure those goods and services that have been approved by the department head/unit leader. This amount must be all-inclusive, including freight and any other related charges; otherwise, a requisition must be used.

Campus departments and service units should communicate the procurement need to OSUIT Purchasing via an expedient method (preferably electronic format) along with all pertinent support documents including quotes (if any) obtained by department personnel.

5.02 Examples of support documentation for purchases and required for requisitioning include but is not limited to:
- Specifications for items requiring formal solicitation (on a Continuation Sheet)
- Quotes
- Supplier/Vendor Listing
- Professional Service Affidavits
- Non-Collusion Affidavits
- Sole Source/Sole Product
- Agreements
- Contracts
- Renewal Letters
- Equipment Lists
- Registration Forms

5.03 Exclusions: Certain types of purchases are prohibited by the P-Card guidelines and may not be made through the use of P-Card. They must be made by requisition and may require additional processing. The following list identifies those excluded purchases:

A. Restricted Purchases
- Food
- Items purchased for Resale
- Conference Registrations
- Conference Training Expenses (Hosted by OSU/OSUIT)
- Clothing, footwear and/or Uniforms for Employees (Before clothing can be purchased for any employee a taxability determination must be made. The Request for Determination of Taxability form must be completed by the
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department and submitted to the Vice President of Fiscal Services for determining. That determination impacts whether or not P-Card may be used.)
• Student Organization Expenses

B. Prohibited Purchases
• Gifts, including cards, flowers, gift cards
• Postage
• Personal items

C. Must be ordered by Requisition
• Maintenance/Rental/Lease Agreements greater than $5,000 for the fiscal year
• Rental or Lease of Equipment
• Buildings or Land
• Insurance
• Purchases from University or State Employees
• Purchases for employees (awards, clothing, etc.)
• Payment for Professional Services and Honorariums
• Contract purchases

D. Must be routed through other departments:
• Subscriptions or Periodicals (by Library only)
• Computer Hardware and Software (reviewed by Computer Information Services)
• Off Campus Print Jobs (by campus Copy Center and must be approved by Marketing)
• Merchandise available in the Campus Bookstore or General Store should be purchased there whenever possible.
• Repairs of equipment (by Purchasing Office)
• Expenditure of Grant or Plant Funds Ledgers 5 & 7 (by Project Director)
• Supplier Quotations $2,500.01 and above (by OSUIT Purchasing)

REQUISITIONS/PURCHASE ORDER PROCESS (electronic)

6.01 Any purchase that cannot or should not be made on a P-Card should be submitted online to the OSUIT Purchasing Office through the requisition process. Any and all support documentation for the requisition, including but not limited to the Continuation Sheet with specifications and a supplier listing (Vendor List), should be included. This information/document(s) will be combined with the University’s Terms and Conditions to create the appropriate type of solicitation for competitive bidding:

• Request for Quotation (RFQ) – a standard business/government process used to invite suppliers to bid on specific products or services with specified terms and conditions. These specifications are to ensure all the suppliers are bidding on the same item/service. Suppliers have to return the bidding by a set date and time to be considered for an award.

• Request for Proposal (RFP) – an approach to contracting when the agency isn’t certain but proposes what it wants and is looking to the supplier to develop a
solution and cost estimate when competitive sealed bidding may not be advantageous. Under this practice, suppliers submit their own proposal which may include necessary plans, drawings, personnel information and any other documents that can help demonstrate their capabilities to contract. Under the RFP process, discussion and negotiations are allowable with the respondents whereby best and final offers are then solicited.

- Invitation to Bid (ITB) – use for procurement solicitations for projects generally greater than $100,000 and in value where the agency knows exactly what and how many of everything needed in the contract as well as when and how the products and services are to be delivered. The award generally is based on price.

A. A continuation sheet in electronic format (Word or Excel) is used to provide detailed information including specifications (or reference to attached specifications) to potential bidders for all items to be purchased (see Shared Drive: I).

B. Specifications are to be established by the requesting department and will not be changed or substituted by the Purchasing Office without prior consultation with the department. Specifications shall be written to provide open competition and to ensure procurement of satisfactory merchandise. The specifications must include as a minimum, all critical, technical, and performance data, compatibility requirements, a referential model number and manufacturer, all important operational features, and/or Scope of Work where applicable. The specifications may be included on the continuation sheet or as a separate attachment. Use brochures only if these items are clearly marked.

C. Departments are encouraged to attach a supplier listing (Vendor List) that includes current addresses and contact information including telephone, fax and website (where available), particularly in the case of special items not in common use or when the items can be purchased only from a limited number of sources. Other possible sources may be investigated by the Purchasing Department. Please indicate the preferred supplier by placing it first on the list (see Shared Drive: I).

D. If any item is to be restricted to one supplier or to one manufacturer only, then a Sole Source/Sole Product Affidavit is available within the “Form” tab in the requisitioning system and must be completed and attached (see Shared Drive: I). Requests must be in compliance with State of Oklahoma statutes, and require proper approval.

E. Student Technology Fee purchases: Minutes from the meeting where student approval was given for the purchase utilizing Technology Fee monies are not required to be attached for requisitioning; rather, they are to be maintained within the academic department.

F. Requisitions: All requisitions will be placed into workflow by the OSUIT Purchasing Office, based on the information from the procurement request and any attachments. Once this form has been completed and signatures secured, it will be forwarded to the OSU-Stillwater Accounting Office for further processing (for purchases above the delegated purchasing limit).
6.02 Requisition Entry: Department personnel initiates a requisition within the university’s electronic procurement system by accessing the site and as a “shopper” either making selections from the available suppliers or making the non-catalog selection, whereby any support documents are uploaded to support the purchase either for bidding or to request payment of an invoice for products and/or services received. The requisition/cart is assigned to OSUIT Purchasing (Requester) where it will then be routed for departmental, vice presidential and administrative approval (if required).

6.03 Requisition Processing: the Cart/requisition is matched with the appropriate support documents and submitted into workflow electronically by OSUIT Purchasing Office to University Accounting and Purchasing Department in Stillwater where it is processed in compliance with university purchasing policies and procedures.

The Stillwater Purchasing Office will then process a purchase order as allowed, or as it is in most cases obtains quotations or schedule competitive bidding. Quotation requests (solicitations) are sent to potential bidders for quotations with established due dates. Once bids are opened, the results (as a bid evaluation package/notification) are sent electronically to OSUIT for departmental evaluation and recommendation to award. Timing for this process varies and can range from days to weeks to process from requisition to the purchase order being issued to the vendor.

6.04 Bid Evaluations: Bids are to be reviewed, evaluated by the ordering unit in consultation with the OSUIT Purchasing Office. The "lowest and best" bid is selected and recommended in writing to the Purchasing Office. An Evaluation & Recommendation to Award is then completed by the Purchasing Office and sent to "buyer in charge" in the Stillwater Purchasing Office. The evaluation should meet all policy requirements of law and fairness. Based on an acceptable evaluation, a university Purchase Order will be issued. The university reserves the right in all cases to reject all bids and either re-bid or cancel the requisition.

6.05 Purchase Order: If approved, the requisition is converted into a Purchase Order, and the order is placed with the vendor. Once issued, copies of all purchase orders, complete with summary/details can be viewed online via simple search.

6.06 Change Orders: If it is necessary to change a purchase order, the department is to provide written details immediately to the Purchasing Office, which will implement the necessary changes with the Purchasing Department at Stillwater and the vendor.

6.07 Invoices: Invoices for products and services requisitioned through the university’s electronic procurement system request campus billing Attention: OSUIT Purchasing Office for manual invoices from the supplier. The ordering department is responsible for matching the invoice to the appropriate order and approving payment as appropriate and returning invoices to OSUIT Purchasing for payment processing. For all invoices received electronically (via the e-procurement system), the ordering department is responsible for “receiving” the invoice by examining the invoice (price billed to PO price) for correctness. If there is a discrepancy, the OSUIT Purchasing Office is to be contacted for assistance and reconciliation.
The university’s payment terms are “Net/30” and all departmental invoices should be approved for payment in a timely manner to avoid delay(s) in the vendor receiving payment within these terms. Should there be an issue or dispute with an order/invoice that may hinder prompt payment the OSUIT Purchasing Office should be contacted to assist with any resolution.

The ordering department is responsible for authorizing payment of these invoices. These invoices should be audited for products received, pricing and extensions. Any discrepancies should be clarified and/or corrected immediately. Approved (signed where necessary) invoices should be forwarded in a timely manner to the Purchasing Office.

6.08 Procedures for the Receipt of Merchandise and Services: The ordering department is responsible for the inspection of all items to assure goods and services received are as specified and for contacting the supplier for correction if necessary. In the event of an impasse between the ordering department and the supplier, assistance may be obtained from the OSUIT Purchasing Office. The university does not pay invoices on merchandise intended for prompt return. Instead, the ordering department should contact the vendor for the credit memo to match with this invoice to allow payment of only the items kept. Departmental personnel in conjunction with the Purchasing Offices, however, must follow up on these invoices to keep suppliers paid.

6.09 Payment: OSUIT’s Purchasing Office will verify, and attach where necessary, the approved invoice(s) noting the amount approved for payment and then submit via the university’s electronic procurement system to University Accounting Stillwater for payment processing in accordance with university policy.

VENDORS

7.01 Credit Application: The State of Oklahoma does not allow state agencies to acquire credit. If needed, the Purchasing Office may assist with direct billing accounts with vendors.

7.02 Where new vendors are to be used for purchases, a completed Form W-9, Request for Taxpayer Identification Number (TIN) and Certification should be requested from the supplier and forwarded to the OSUIT Purchasing Office. This information will be transmitted to University Purchasing for input into the e-procurement requisitioning system.

7.03 Vendor Relations: Departments are encouraged to seek information on products and services from vendor representatives. They are a valuable source of information. The Purchasing Department should also be advised of department needs to better assist in locating vendors and developing a procurement plan.

CONTRACTS

8.01 Computer Technology: OSU has a very competitive contract for computers. Contact OSUIT’s Computer Information Services (CIS) department for purchases of computer
technology (including tablets) and software. All computer accessories and software purchases must be approved through the CIS department.

8.02 Printers: Contact OSUIT CIS as these purchases also require their approval.

8.03 Furniture: OSUIT employees in need of furniture must contact the Purchasing Office, as they have access to the OU Furniture Shared Contract. This multi-vendor contract provides a competitive discount for many furniture brands ranging in all price levels.

8.04 State Contracts: The State of Oklahoma provides contracts for a multitude of items. These items can be ordered without having to go through a bidding process. Contact the Purchasing Office for guidance.

8.05 Prime Vendor Contracts: The university has contracted with multiple suppliers for prime contract services. These vendors are located on the home page of the university e-procurement system; currently: https://capp.okstate.edu/cas/login?service=https://solutions.scquest.com/apps/Router/ExternalAuth/NetId?OrgName=OSU

These vendor contracts should be utilized as the primary source for all products offered.

8.06 Yearly Contracts: OSUIT Purchasing Office will assist departments and service units in planning for yearly renewal of contacts. The contracts cover equipment leases, maintenance and contractual services. All equipment lists greater than $5,000.01 require the Director of Purchasing’s signature. Equipment lists between $5,000.01 and $10,000 should be submitted to okcorral@okstate.edu prior to requisition submission. Contact the Purchasing Office for guidance.

8.07 Service Contracts: all service contracts (maintenance and repair of equipment and building) requiring vendors to perform work on campus must be approved through the Purchasing Office. A service agreement must be completed and submitted to Purchasing with the vendor’s insurance verification attached. The vendor may be required to complete an Affidavit of Completion once the work has been completed. All contracts must be signed by the Director of Purchasing for OSU and the A&M Institutions.

All contracts, regardless of amount, require the Director of Purchasing’s signature. Contracts between $0.00 and $10,000 should be submitted to Purchasing via email at okcorral@okstate.edu prior to requisition submission. Any contract and/or equipment list greater than $10,000 should be attached to the requisition and submitted for approval via the electronic procurement system.

8.08 Purchasing Forms: All purchasing forms can be accessed on the OKM Shared Drive (I:).

8.09 The university’s most current purchasing contacts can be found on the Purchasing webpage at http://purchasing.okstate.edu/
PURCHASING RECORDS & RETENTION

Original invoices for purchases (requisition/PO) as well as all P-Card documents must be retained for a minimum of seven (7) years. At the end of the seven (7) years, departments may contact the Vice President of Fiscal Service to request permission for destruction. Only when permission and instructions for destroying has been received in writing can those documents be destroyed according to policy.

All records shall be maintained as prescribed in OSUIT Policy 1-014, Records and Documents Retention, Security and Control.